



# AGENDA

## Meeting Location:

Sloat Room—Atrium Building  
99 W. 10<sup>th</sup> Avenue  
Eugene, OR 97401

Phone: 541-682-5481  
[www.eugene-or.gov/pc](http://www.eugene-or.gov/pc)

The Eugene Planning Commission welcomes your interest in these agenda items. Feel free to come and go as you please at any of the meetings. This meeting location is wheelchair-accessible. For the hearing impaired, FM assistive-listening devices are available or an interpreter can be provided with 48 hour notice prior to the meeting. Spanish-language interpretation will also be provided with 48 hour notice. To arrange for these services, contact the Planning Division at 541-682-5675.

## **MONDAY, JUNE 9, 2014 – REGULAR MEETING (11:30 a.m. to 1:30 p.m.)**

### **11:30 a.m. I. PUBLIC COMMENT**

The Planning Commission reserves 10 minutes at the beginning of this meeting for public comment. The public may comment on any matter, **except for items scheduled for public hearing or public hearing items for which the record has already closed.** Generally, the time limit for public comment is three minutes; however, the Planning Commission reserves the option to reduce the time allowed each speaker based on the number of people requesting to speak.

### **11:40 a.m. II. METRO PLAN/COMP PLAN UPDATES**

Staff: Carolyn Burke, 541-682-8816

### **12:30 a.m. III. ENVISION EUGENE: MONITORING**

Staff: Heather O'Donnell, 541-682-5488

### **1:15 p.m. IV. ITEMS FROM COMMISSION AND STAFF**

- A. Other Items from Staff
- B. Other Items from Commission
- C. Learning: How are we doing?

Commissioners: Steven Baker; John Barofsky; Jonathan Belcher; Rick Duncan; John Jaworski (Vice-Chair); Jeffery Mills; William Randall (Chair)

**AGENDA ITEM SUMMARY**  
**June 9, 2014**

**To:** Eugene Planning Commission

**From:** Carolyn Burke, City of Eugene Planning Division

**Subject:** Envision Eugene Implementation: Metro Plan/ Comprehensive Plan Updates

**ISSUE STATEMENT**

This work session is an opportunity to provide an update to the Planning Commission on upcoming enabling amendments to the Metro Plan and concepts for a new Eugene-specific Comprehensive Plan.

**BACKGROUND**

Enabling Amendments to the Metro Plan (preface, Chapter I, II, III, IV and glossary)-

Following amendments to Chapter IV of the Metro Plan (which modified the decision making structure and process for amendments to the Metro Plan), another round of policy-neutral revisions to the Metro Plan are needed to ensure that the general text throughout the Metro Plan will be consistent with upcoming Metro Plan amendments by Eugene, Springfield and Lane County to replace the shared metropolitan urban growth boundary (UGB) with two separate urban growth boundaries.

As it is currently written, the Metro Plan text will be an obstacle to the cities of Eugene and Springfield as the two cities take steps toward establishment of their own, separate UGBs based on city-specific policy choices about how to accommodate the 20-year land needs of their separate populations. The Metro Plan was originally adopted in the early 1980s. That version of the Plan and its updates has been based on a premise that there would be a single, shared UGB surrounding both Eugene and Springfield. The Metro Plan is also based on the premise that the two cities and Lane County must jointly adopt policies about how to accommodate the entire region's future population needs within that shared UGB. Consequently, the Metro Plan includes text that is at odds with new requirements that Eugene and Springfield adopt separate UGBs and separate land use planning policies.

Springfield and Eugene will eventually have their own city-specific comprehensive plans to address certain aspects of land use planning independently of one another (e.g. residential and employment land studies and policies). These new city-specific plans will make portions of the Metro Plan unnecessary. Each city is taking a different approach to its establishment of these city-specific plans. It appears that the shift will occur incrementally through a number of actions that take place over the next several years.

During the transition, there will be points in time when portions of the Metro Plan that no longer apply to one city will still be needed by the other city. This concept is not anticipated or provided for in the current Metro Plan. The proposed amendments allow for this incremental shift to take place and provide an explanation of the process to Plan readers.

#### Eugene Comprehensive Plan Concepts-

The Eugene-specific Comprehensive Plan is envisioned to sit within a larger context of the Envision Eugene Plan. Attachment A outlines a four part document that encompasses both the regulatory and aspirational aspects of Envision Eugene. Part one draws the connection between the community visioning process of Envision Eugene and carries forward the pillars, strategies and actions that are contained within the City Council approved Envision Eugene recommendation. Part two delves more into the physical character of the city. Part three serves as the legally required Comprehensive Plan and incorporates both new policies and existing policies pulled from the current Metro Plan. Part four provides guidance for ongoing monitoring and implementation of the plan through time.

Attachment B is a draft outline for the contents of the Eugene-specific Comprehensive Plan (Part two). It will take several years to fully populate this document to make it a stand-alone Comprehensive Plan, and as described above, will work in tandem with the Metro Plan during the transition period. Goals and policies that are required for the adoption of a Eugene-specific Urban Growth Boundary (UGB) will be prioritized. This includes goals and policies for Economic Development (Goal 9), Housing (Goal 10), and Compact Development & Urban Design (Goal 14).

#### **NEXT STEPS**

A City Council work session on the Enabling Amendments to the Metro Plan is anticipated to be held in the fall. Shortly after that, a joint public hearing for the Planning Commissions of Eugene, Springfield and Lane County will be held. After all three Planning Commissions provide recommendations, a joint elected official's public hearing will be held.

As progress is made on the various aspects of the Envision Eugene Plan (including the Eugene Comprehensive Plan) drafts will be brought to the Planning Commission for review.

#### **ATTACHMENTS**

- A. Envision Eugene Plan draft outline
- B. Eugene Comprehensive Plan draft outline

#### **FOR MORE INFORMATION**

Contact Carolyn Burke at 541-682-8816 or at [carolyn.j.burke@ci.eugene.or.us](mailto:carolyn.j.burke@ci.eugene.or.us)

## ENVISION EUGENE: A COMMUNITY PLAN FOR 2032

### **DRAFT OUTLINE**

June 4, 2014

#### PART 1: THE COMMUNITY/ THE VISION

- Introduction
- Trends, Issues & Challenges
- The Vision
  - Pillars, Strategies & Actions
- The Community Process

#### PART 2: URBAN FORM PLAN

- Introduction
- Regional Identity
- Urban Form Plan
- Design Principles

#### PART 3: EUGENE COMPREHENSIVE PLAN

- Introduction
- An Integrated Vision
- Goals & Policies
- Comprehensive Plan Map and Descriptions
- Appendices

#### PART 4: IMPLEMENTATION, MONITORING & MEASURING SUCCESS

- Introduction
- Implementation Strategies
- Measuring Success
  - Monitoring & Analysis

## PART 3: EUGENE COMPREHENSIVE PLAN

### **DRAFT OUTLINE**

June 4, 2014

#### INTRODUCTION

- Plan purpose

#### SECTION 1: AN INTEGRATED VISION

- Relationship to Envision Eugene
  - Crosswalk

#### SECTION 2: GOALS & POLICIES

Chapter 1	Public Involvement	<ul style="list-style-type: none"> <li>• Goal 1: Public involvement</li> </ul>
Chapter 2	Economic Development	<ul style="list-style-type: none"> <li>• Goal 9: Economic development</li> </ul>
Chapter 3	Housing	<ul style="list-style-type: none"> <li>• Goal 10: Housing</li> </ul>
Chapter 4	Compact Development & Urban Design	<ul style="list-style-type: none"> <li>• Goal 14: Urbanization</li> <li>• Annexation policies</li> <li>• Urban Design</li> </ul>
Chapter 5	Community Health and Livability	<ul style="list-style-type: none"> <li>• Goal 8: Recreation</li> <li>• School siting and planning</li> <li>• Culture/ Art</li> <li>• Community Health</li> <li>• Quality of life/ Livability</li> </ul>
Chapter 6	Natural Resources & Environmental Considerations	<ul style="list-style-type: none"> <li>• Goal 5: NR, scenic and historic, open space</li> <li>• Goal 6: Air, water and land</li> <li>• Goal 7: Natural hazards</li> <li>• Goal 13: Energy conservation</li> <li>• Goal 15: Willamette greenway</li> </ul>
Chapter 7	Public Facilities & Services	<ul style="list-style-type: none"> <li>• Goal 11: Public facilities &amp; infrastructure</li> <li>• Capital Improvement Plan</li> </ul>
Chapter 8	Transportation	<ul style="list-style-type: none"> <li>• Goal 12: Transportation</li> </ul>
Chapter 9	Administration & Implementation	<ul style="list-style-type: none"> <li>• Goal 2: Coordination with partners</li> </ul>

#### SECTION 3: COMPREHENSIVE PLAN MAP AND DESCRIPTIONS

#### SECTION 4: RELATIONSHIP TO OTHER PLANS

#### APPENDICES:

- Glossary
- Works cited

## **AGENDA ITEM SUMMARY**

**June 9, 2014**

**To:** Eugene Planning Commission

**From:** Heather O'Donnell, City of Eugene Planning Division

**Subject:** Envision Eugene Implementation: Monitoring

### **ISSUE STATEMENT**

This work session is an opportunity to provide an update to the Planning Commission on the monitoring program for Envision Eugene. No action is requested.

### **BACKGROUND**

Two primary goals of the Envision Eugene project are to: 1) determine how Eugene will accommodate the next 20 years of growth in our community, as required by state law, and 2) create a future that is livable, sustainable, beautiful and prosperous.

The City Manager's March 2012 Envision Eugene recommendation includes several strategies and actions to implement the Envision Eugene vision. One of the key strategies supporting the "Flexible Implementation" pillar is to create an ongoing monitoring system to collect and track information related to assumptions we've made about the next 20 years of growth.

Consistent with this strategy, a draft Growth Monitoring Program has been developed that is intended to provide the information needed by the community and decision makers to periodically assess the validity of assumptions and inform the effectiveness of strategies adopted as part of Eugene's new comprehensive plan. The draft monitoring program is informed by input from key partner groups and agencies, research from other jurisdictions, and ongoing refinement of the data collection list and data collection systems. Most recently, the Envision Eugene Technical Resource Group (TRG) has given substantial input that helped shape the draft program.

### **NEXT STEPS**

The draft Growth Monitoring Program will be revised based on recent feedback from the TRG. The TRG will be discussing the options for ensuring the program is institutionalized, and staff will be developing templates for monitoring reports. The data collection systems will continue to be tested and refined. Staff will bring further updates to the Planning Commission as this work progresses.

### **ATTACHMENTS**

- A. Draft Growth Monitoring Program (March 13, 2014, no appendices)

### **FOR MORE INFORMATION**

Contact Heather O'Donnell at 541-682-5488 or at [heather.m.odonnell@ci.eugene.or.us](mailto:heather.m.odonnell@ci.eugene.or.us)

## Growth Monitoring Program

### Purpose

The *Envision Eugene* Pillar 7: Adaptable, Flexible and Collaborative Implementation, is the impetus for the Growth Monitoring Program. Pillar 7 acknowledges that while Eugene's new comprehensive growth plan is based on well-founded assumptions about what will happen in the future, not all of the assumptions will be correct and the plan needs to be flexible enough to address changing conditions and needs in the community. The purpose of the Monitoring Program is to provide the information needed by the community and decision makers to periodically assess the validity of growth planning assumptions and inform the effectiveness of strategies adopted as part of the new comprehensive plan and urban growth boundary (UGB). With this information, decision makers can determine whether the growth plan and/or related implementation activities need to be adjusted. The Monitoring Program both demonstrates and formalizes the City's commitment to a growth plan that is flexible enough to address changing conditions and needs in the community.

**Key goals** of the Growth Monitoring Program include:

- Have data that is complete and relevant to future needs
- Collect data efficiently
- Provide accessible, transparent information to the community
- Develop the ability to regularly assess current status of the land supply
- Develop the ability to identify growth planning trends

### Outcomes

Providing a comprehensive monitoring program has numerous beneficial outcomes. These include but are not limited to:

- ✓ Increased reliability and on-going tracking of the buildable lands supply status
- ✓ Reduced city costs of future growth planning efforts
- ✓ Increased public trust in the growth planning process
- ✓ The community is in a better position to respond to changing conditions
- ✓ Better collaboration with regional partners, creating a more complete picture about regional trends

### Monitoring Program Summary

The Growth Monitoring Program includes several important steps as outlined below. Details about each step are provided on the following pages and appendices.

#### Preliminary Steps

These early steps provide the foundation for the Monitoring Program. The results of these steps are not anticipated to change much over time, although some refinement to the data collection process is anticipated to occur as the monitoring results and program are evaluated.

#### Participants:

A wide range of participants is needed throughout the monitoring process to ensure the program's success. Participants include government staff, review bodies (technical advisory committee, City Manager, Planning Commission),

decision makers (City Council), and importantly, the general public.

**Identify Data to Collect:**

Several types and sets of data are identified for monitoring. Monitoring data are selected based on criteria, such as their relevance and relative weight to key trend and land supply questions, availability, reliability, and if the data is related to multiple monitoring areas. Some “key data” are identified that have a larger impact or are more relevant to the buildable lands supply or Envision Eugene strategies/actions than other data being collected.

**Collect the Data:**

The methodology for collecting each type and set of data is identified, including how to collect it, the source for collection, when to collect it, and who collects it.

**Program Steps**

These steps make up the bulk of the Monitoring Program and are repeated regularly over time.

**Step 1 Report Results:**

The monitoring results are provided at varying reporting periods and methods according to the data and level necessary. Annually, a report is generated on the key data. Every five years, a comprehensive report is generated on the key data, as well as other data necessary to explain the trends and answer key questions. Reports are also provided on an as needed basis. Some reports may include trends in the data over time and comparisons of the results to the original planning assumptions.

**Step 2 Analyze Results:**

The results of the reports are reviewed by a technical advisory committee (TAC) and verified for public release. Some monitoring results may warrant a more “in-depth” level of review, meaning analysis of other data or studies that help explain the monitoring results is necessary before the report can be issued.

**Step 3 Take Action:**

Some monitoring results or the findings of an in-depth review, may reveal a trend that warrants exploring whether the city should take some sort of action to respond to changing trends and needs. Possible actions range from wait and see how the trend plays out, to starting a new complete UGB planning review.

**Program Evaluation:**

The Monitoring Program is periodically evaluated to ensure efficiency and accuracy and that the program goals are being achieved.



## Monitoring Program Steps

### Participants

In order to have a successful monitoring program, many people need to be involved during several points in the process. Broad participation is important to meet goals regarding transparency and access of the monitoring results and process. It can also help ensure the program is answering the important questions by bringing in experienced and professional topic experts that can help inform the review process and evaluate the results. Participants include:

- **LOCAL STAFF:** City of Eugene Planning Division staff are the primary coordinators of the Monitoring Program, including gathering the data from various sources, reporting the monitoring results, providing technical expertise, staffing and participating on the TAC, and coordinating the monitoring review process. Other Eugene staff collecting relevant data includes staff working in building permits, transportation, and sustainability. Staffs from other jurisdictions also collect relevant data, such as Lane Council of Governments (LCOG), Lane County (Assessor and public health), utility providers and schools.
- **REVIEW BODIES:** The review and analysis of monitoring are coordinated with a technical advisory committee (TAC), comprised of community members with diverse interests and areas of technical expertise and city staff. The primary role of the TAC is to review monitoring reports, explore related technical questions to further a factual understanding of conditions, and to recommend to staff possible actions, or a range of actions, that may be needed to address changing trends. This work, as well as maintaining institutional memory regarding the monitoring efforts, necessitates regular meetings of the TAC. The **TAC operating framework is provided in Appendix X**. Some instances may also warrant review by the City Manager or the Planning Commission, such as if significant changing trends are apparent or a additional action is recommended.
- **DECISION MAKERS:** It is anticipated that there will be some limited instances when the monitoring results and recommended actions will warrant review by City Council, such as if significant changes in policy direction or to the program are recommended.
- **THE PUBLIC:** Stakeholders and other interested parties in the community at large are invited to participate in several steps of the monitoring process. All final reports and analysis results shall be made available to the public through the Permit and Information Center and the City's web site. Meetings of the TAC, Planning Commission, and City Council are open to the public to hear and comment on discussion as well as any recommended actions. Public comment shall be gathered to inform periodic evaluation of the Monitoring Program.

### Identify Data to Collect

In general, the objective is to collect the data that will answer the right questions, such as whether an Envision Eugene strategy has been successful or if the actual outcomes match the planning assumptions relied upon as part of Envision Eugene. Identification of the pertinent questions for monitoring to answer, along with the previous experience on Envision Eugene, results in a list of quantitative and qualitative data to collect (**see Appendix X, Data Reporting Types by Pillar**).

#### Quantitative Data

Much of the data to collect is quantitative, meaning it is more easily measured and quantifiable and less subjective in nature than other data. The quantitative data to collect falls into several broad categories:

- **General Trends** (e.g. population growth, acres in vacant land supply)
- **Residential Development Trends** (permit data; e.g. new housing units built)
- **General Residential Trends** (e.g. household size/persons per household)
- **Employment Development Trends** (permit data; e.g. new employment building capacity built)
- **General Employment Trends** (e.g. number of jobs created by employment sector type)
- **Other Data** (e.g. 20-minute neighborhood assessment)
- **Regional Trends** (e.g. regional residential construction data)
- **Efficiency Strategies & Investments** (number of new controlled income and rent units)

**Appendix X** includes the entire list of quantitative data sets to collect. Data identified with “\*” are identified as key data to collect and report on more frequently because they have a larger impact or are more relevant to the buildable lands supply or Envision Eugene strategies/actions than other data being collected. The other data being collected is secondarily or conditionally relevant to help inform key data trends. The trends of secondary or conditional data are reported less frequently and in many cases only as needed.

### Qualitative Data

Some of the Envision Eugene strategies and actions that need to be monitored and measured are more subjective in nature so the data being collected is more qualitative than quantitative. For instance, the amount and type of development seen can be quantified, but it is important to also measure whether the development is achieving our qualitative goals and objectives, such as to create livable neighborhoods and enjoyable mixed use transit corridors and commercial areas. While measuring quality objectives may be subjective, the measurements do not necessarily need to be vague. Identifying the important qualitative elements in development helps to identify what elements of development need to be measured and how to measure it. Thomas Gilbert identified three quality requirements<sup>1</sup> by which qualitative issues could be measured. The following summarizes those quality aspects and how they may be applied to developments or accomplishments to measure if they are meeting Envision Eugene’s qualitative strategies and actions:

- **Accuracy.** What is the degree to which an accomplishment matches a model without errors? (e.g. How well does the development or accomplishment match the ideal?)
- **Class.** Is the accomplishment superior to most in some way beyond accuracy? (e.g. Is the development or accomplishment superior to other developments/accomplishments in some way?)
- **Novelty.** Does the accomplishment demonstrate originality? Does it embody features or aspects that distinguish it favorably in particular dimensions? (e.g. Does the development/accomplishment demonstrate originality or does it embody features or aspects that distinguish it favorably?)

See **Appendix X** for the qualitative assessment framework (*Has not been started; for now refer to Data Reporting Types by Pillar for which strategies/actions require qualitative assessment*).

### Other Items to Monitor

Other information or issues related to development trends and growth planning may arise that are not specifically mentioned above. Examples include new studies on demographic or development trends such as from the University of Oregon or the Urban Land Institute, or changes in federal, state or local policies, laws and regulations related to development. Monitoring this information takes place in the course of normal practice

<sup>1</sup> *Human Competence: Engineering Worthy Performance*, Thomas Gilbert, <http://books.google.com> and, Dave Ferguson <http://www.daveswhiteboard.com/archives/4189>.

and operation of the Planning Division in conjunction with governmental, institutional and community partners, as needed and as resources permit; the methods and scope are not specifically prescribed by the Monitoring Program.

## Collect the Data

Each type and set of data identified for collection requires a specific collection methodology (see Appendix X, data collection methods). The methodology includes at a high level which Envision Eugene pillar the data helps monitor down to the details of who collects the data and when.

Collection methodology for each data point:	Example entries
<b>Envision Eugene Pillar-</b> The overarching Envision Eugene pillar of the strategy or action that the data is monitoring	<i>Housing Affordability</i>
<b>Data-</b> the specific data type or set that is being collected and monitored	<i>structure type</i>
<b>Key question-</b> the key question that the data is helping to answer	<i>How many new single-family homes were built? How many new multi-family homes were built? What is the housing mix of new development?</i>
<b>Description/definitions-</b> the description and any applicable definitions of the data being collected	<i>The mix of new housing units permitted is derived from the number of new housing units permitted and the type of structure each unit is in. Housing structure types are grouped into four main categories and result in a "housing mix" (generally expressed as the percentage of single-family vs multi-family housing). These housing types are mutually exclusive: a)"Single-family detached" means... b)etc.</i>
<b>Definition source-</b> the origin of the data definition	<i>Oregon Administrative Rule 660-008-0005 and the city</i>
<b>Basic methodology-</b> a general description of the overall collection method	<i>Collect the type of new buildings being constructed, including additions and standalone buildings.</i>
<b>Collection Source-</b> the institution or process that originally collects the data	<i>Building permit process</i>
<b>When is it collected-</b> the time of year or point in the process when the data is originally collected	<i>Building permit issuance</i>
<b>Who collects it-</b> the city staff responsible for either entering the original data into the original collection source, or for obtaining the data from a non-City source (e.g. PSU, U.S. Census)	<i>Building plans examiner or Land use analyst</i>
<b>How is it collected-</b> the type of system, program, or report the data is originally collected into	<i>Building permit database entry field</i>
<b>When is it available-</b> the frequency that the data is available from the original system/program/report (reporting frequency/timing may differ from data availability)	<i>As needed</i>
<b>How it will be reported/integrated-</b> the report or	<i>Building permit database report</i>

## Step 1 Report Results

Regular reporting is necessary to identify trends, know the status of the buildable lands supply, and promote transparency and accessibility of information. Monitoring reports shall be developed at regular intervals and on an as needed basis. The reports include varying levels of detail depending on the level of analysis warranted, and are presented in a clear and concise manner. Each report includes annual trends in the data and as needed, cumulative trends since the beginning of the planning period (2012). It is also important to put the results into context by projecting the actual monitoring results over the 20-year planning period (2012-2032) and comparing the actual results to the original Envision Eugene planning assumptions.

Some data may be available in a relatively “live” format on the city’s website. Examples may include the number of building permits issued by use category and an approximation of available buildable land supply. However, the most comprehensive and verified information shall be available in one of the following report types:

- a. **Annual Report:** An annual report includes information on development activity and the available buildable land supply. The trends of key data related to development activity and land supply is the focus of these reports. An accompanying narrative is kept to a minimum but generally includes a brief overview of the monitoring review period and focus of the report, explanation of the supporting graphs/tables, and highlighting any key trends in the context of the Envision Eugene planning goals.
- b. **5 Year Report:** A comprehensive report is provided every 5 years and includes information on development activity, the available buildable land supply, and economic and demographic data. The trends of key data as well as other relevant data identified in [Appendix X](#) and an evaluation of the effectiveness of the Envision Eugene strategies is the focus of the report. A more lengthy narrative is warranted, including all of the components of the annual report and as well as detail regarding longer-term trends (e.g. trends since 2012), a broader range of data sets, the relationship of necessary secondary and conditional data to key data, an evaluation of the effectiveness of Envision Eugene strategies, and brief summaries of economic and demographic trends where necessary.
- c. **As Needed:** Additional reports may also be provided on an as needed basis, for example due to city, state or federal changes (to assess any impact of regulation or programmatic changes on the buildable lands supply), an external event, new studies, or to monitor trends that require a longer timeframe than five years to evaluate. As needed reports focus on trends in data relevant to the circumstances initiating the report. Information may be presented at either an annual or 5 year report level of detail and narrative.

## Reporting Framework

Reporting Framework			
	Annual Report	5-yr Report	As Needed Report
Report Timelines			
Initiate First Report	Following adoption early 2015	Early 2018	As needed
First Report Timeframe	1/1/13-12/31/14*	1/1/13-12/31/17	As needed
Baseline Year	2012 BLI + efficiency strategies (UGB adoption date)		
Report Components			
Key Data (e.g. housing mix)	X	X	X (if applicable)
Secondary Data (e.g. housing affordability)	X (if applicable)	X	X (if applicable)
Conditional Data (e.g. regional construction data)	X (if applicable)	X (if applicable)	X
Data Reporting Intervals	Annual; the actual totals for the reporting year Cumulative; the sum actual totals per year since the baseline year (2012)		
Data Context	The actual annual and cumulative results is put into context, where necessary, through: -Linear projection of the actual totals over the 20-year planning period -Comparison of the actual totals to linear projections of the original Envision Eugene assumptions over the 20-year planning period -Comparison of the actual totals to linear projections of the original Envision Eugene assumptions as adjusted by actual population growth as a percentage of the total estimated population growth over 20-year planning period		

\*The first annual report will be prepared following adoption and cover any full calendar year(s) between the 2012 BLI (12/31/12) and the date of adoption. After that, annual reports will be prepared every year.

## Step 2 Analyze Results

The monitoring results are reviewed to determine if they are ready for public distribution or if an in-depth level of review is needed. Review of the results is coordinated primarily with a technical advisory committee (TAC). The monitoring results are reviewed as follows:

### Initial Review

The initial monitoring reports, including staff's assessment of what the results mean, are reviewed by the TAC. The TAC reviews for errors as well as provides technical expertise such as regarding if data is performing outside of the normal projections, if there are gaps in the data and whether an in-depth level of review is needed. This may entail looking at past trends, annual and cumulative results, reasonable ranges for the data, related secondary or conditional data, and 20 year trend projections. It is anticipated that the results of most annual monitoring reports (and some as needed reports) will be a simple review, where after reviewing the trend using one or more of the previously identified tools, the trends are determined to be relatively in-line with the previous planning assumptions and no additional review is necessary. If an in-depth review is not necessary, the annual monitoring or as needed report can be publically released.

### In-depth Review Triggers

In some cases, a more in-depth level of review of the monitoring results may be necessary to understand both the causes and implications of the information reported. Circumstances that may necessitate an in-depth review for each report type include:

- Annual Report- The annual report includes a significant variation of some data from the initial planning assumptions. “Significant variation” may include one or more of the following:
  - a. A new population forecast for Eugene’s UGB is issued by Portland State University
  - b. The key data when projected out shows a significant divergence from the assumed trend by the end of the 20-year planning period (see **Appendix X, ranges for variations in data**)
  - c. Multiple data sets appear to be in a divergent trend
  - d. At least 50% of the forecasted population is met (*placeholder until HB 2254 rules are complete*)
  - e. At least 50% of the buildable land is developed (*placeholder until HB 2254 rules are complete*)
- 5 year Report- All 5 year reports warrant an in-depth review.
- As Needed Report- As needed reports may require an in-depth review depending on the circumstances that initiated the reporting.
- In-depth review of any report may be initiated for other reasons as directed by City Council.

### In-depth Review Process

An in-depth review is defined by additional rigor in determining the cause, magnitude, and implications of data trends, as well as the potential for recommended actions. In-depth review is conducted as a partnership between staff and the TAC, and may include one or more of the following activities:

- One or more TAC meetings
- Analysis of exploratory questions regarding any divergent trends. Questions could include, for example: Is the data set too small to make any assumptions about? Is one project skewing the results? Are changes driven by a major economic, natural, cultural event? If yes, was it a one-time event? Does the divergence look like a fluctuation or is it an actual changing trend?
- Exploring hypothetical scenarios of what would be necessary to get the data projections back in line with the original projections
- Use of a land use simulation software, such as UrbanSim (<http://www.urbansim.org>), to help visualize the impacts of the data results
- Discussion of options to adapt to changing trends and needs
- TAC recommendation to staff regarding potential actions (Step 3)

## Step 3 Take Action

Following an in-depth analysis, a determination must be made regarding whether or not the monitoring results warrant action by the city to address changing trends and needs. The process for making this determination allows for rational analysis, transparency, and participation while protecting the community’s investment in planning efforts and ensuring a needed measure of adaptability.

### Action Options

Because predicting future growth needs is challenging, a wide spectrum of potential actions must be considered to meet the community’s needs and changing circumstances. Recommended actions may include the following:

- a. Do nothing; **wait and see** how the trends play out for one or more years
- b. Direct staff to **explore contingency measures**, i.e. possible future actions that may be considered later if trend divergence continues. These could include a) focusing on programmatic efforts to slow consumption of land supply within the existing Envision Eugene policy framework, such as through greater investment in current programs, b) undertaking urban reserve planning to identify where future UGB expansion might occur, or c) reconsideration of previous City Council actions or policies that may be relevant to the current situation



- c. Direct staff to **implement new or previously identified solutions** (e.g. previously identified contingency measures under b)
- d. Direct staff to accelerate **a new UGB planning review** process (current date of next comprehensive review is 2032, or planning year 20). This option may require consideration of a new policy framework from Envision Eugene, new efficiency measures, and new UGB expansion areas.

### Recommendations & Decision

- **TAC Review & Recommendation.** Based on the in-depth review, the TAC may make a recommendation to staff regarding whether additional action, or a range of actions, should be taken. Considerations may include:
  - Is there an action the City can take in the context of addressing development capacity, or is it out of the City's control?
  - Is action necessary in the context of the planning period, or is there enough time left in the planning period for the divergent trends to align with the projections?
  - The TAC could recommend that action is not necessary at this time. In this case, the report can be released to the public with no further review necessary.
  - The TAC could recommend that action is necessary, and if so, provide an action recommendation to staff.
- **Review of Recommendation & Decision.** The TAC and staff recommendations for moving forward may warrant additional review and a decision from others including the City Manager, the Planning Commission or the City Council. For instance, a recommendation to start a new UGB planning review process (action option d) is a new project that ultimately must be directed to staff by the City Council.

### Program Evaluation

The Monitoring Program shall be periodically evaluated to ensure efficiency, accuracy and that the program goals are being achieved. The collection and reporting tasks identified in the Monitoring Program have been developed without full knowledge of how the information will be used in the future. This calls for a system that is both comprehensive and flexible. To ensure the adaptability and success of the program over time, a comprehensive evaluation shall be conducted approximately every five years.

Review of program adjustments may be conducted as follows:

- Adjustments regarding data collection are reviewed by the TAC on an as needed basis
- Major adjustments to the program, such reporting frequency or in-depth review triggers and process, are reviewed by the TAC and other bodies as necessary
- Comprehensive evaluation of the Monitoring Program are reviewed by both the TAC and other bodies as necessary

### Appendices

TAC Operating Framework (*draft outline*)  
 Key Questions & Key Data  
 Data Reporting Types By Pillar  
 Quantitative Data List  
 Quantitative Data collection methods (*To be developed*)  
 Data Definitions & Relevance (*page 1 draft only*)  
 Range Variations for Quantitative data (*To be developed*)